

ASEAN Warehousing And Distribution Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The ASEAN Warehousing And Distribution Logistics Market size is estimated at USD 33.04 billion in 2025, and is expected to reach USD 42.78 billion by 2030, at a CAGR of 5.3% during the forecast period (2025-2030).

As one of the world's fastest-growing economies, Southeast Asia has benefitted from a broad-based economic growth model based on global trade, inward investment, and regional and global integration into value chains. However, sustaining this growth momentum will necessitate several reforms to strengthen the region's economic and social resilience. These reforms will include lowering regulatory barriers to competition and market entry to promote innovation, productivity, and efficiency.

Warehousing and distribution logistics in ASEAN are expected to experience rapid growth due to the rapid growth of the e-commerce sector. The high demand for last-mile logistics and the fast-developing transportation infrastructure contribute to the development of ASEAN's warehousing and distribution logistics market. The presence of foreign firms in the region, as well as government initiatives like Adapt and Grow & Go Digital, in addition to the growing logistics industry, is driving the growth of the warehousing and distribution market in the region. Singapore is one of the major countries in ASEAN. With its geographical location and strong freight and logistics business, it is one of the fastest-growing countries in the region. Major players in the region have significantly funded the warehouse infrastructure.

Warehousing demand has been on the rise in some regions, mainly due to the growth of e-commerce. The previous year, BW (Vietnam's #1 Industrial For-Rent Developer), specializing in developing warehouses and factories to rent, received unprecedented requests. BW's long-term development strategy allowed it to take advantage of these short-term opportunities effectively by constructing light and contemporary industrial warehouses to cater to the growing manufacturing demand and the explosion of e-commerce growth.

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The demand for cold storage is rising, forcing companies to adjust their supply chain strategies. According to the industry report, foreign investors are increasingly interested in building cold storage facilities in Vietnam to benefit from the urbanization process and retail modernization, changing how Vietnam's big cities get fresh food. The supply chains are expected to become more efficient in the future due to significant infrastructure investment and development, including the construction of the long-awaited Long Thanh International Airport.

ASEAN Warehousing And Distribution Logistics Market Trends

Increase in Warehousing Space in Thailand

Warehouses are not just storage rooms. They house value-added operations such as just-in-time packing, assembly, product customization, etc. Over the past five years, Thailand has seen incredible growth in e-commerce. The e-commerce warehousing cluster is between 15 and 23 km along Bang Na-trat Road in Bangkok.

Thailand has seen massive growth in the retail market in recent years. There has been a steady rise in organized retail or contemporary shopping nationwide. The increasing disposable income of the people in Thailand, the large youth population, and the booming tourism industry have attracted a lot of foreign brands. This has led to an increase in warehousing services.

During the forecast period in Thailand, operators of leased warehouse space will continue to experience business growth in line with a gradual economic upturn, driven mainly by an upturn in the export industry and a recovery in domestic retail. Investment in new supply tends to increase over the next three years. Large players will be at the forefront of this, leading to oversupply in some local markets, increasing competition on pricing, and limiting operators' ability to increase rents.

Currently, the majority of operations are modernizing their facilities to provide modern warehousing solutions, which, in turn, allows them to expand their client base and generate revenue through additional services. Players are also modernizing their facilities through other means, such as upgrading their warehouse buildings to meet industry standards (for example, the LEED scheme), investing in energy efficiency and environmental protection, and installing facilities that enhance resilience to natural disasters, such as flooding and earthquakes. Warehouses have expanded their floor and ceiling space, increasing the speed and ease of goods movement.

E-commerce Growth in the ASEAN Region is Driving the Market

The current phase of e-commerce in Southeast Asia is about more than just increasing value. Consumers in the region increasingly purchase a wider range of products online through various channels. The region's supply chains will likely require new logistics capabilities to meet this growing demand for fulfillment. Those who already possess these capabilities and those new to the market will benefit the most from these changes.

Southeast Asia is a patchwork quilt of economies at various stages of development; it is only natural that e-commerce penetration rates vary from country to country. Indonesia and Singapore account for approximately 30% of the region's e-commerce penetration, with the Philippines, Thailand, and Vietnam trailing at around 15% each. The largest Southeast Asian economy, Indonesia, accounts for 51 of the region's GMV growth due to its large consumer market.

As Southeast Asia's e-commerce market moves into the next phase of growth, customers will make more digital purchases across all product categories and channels, and they will also demand and pay more for new and advanced logistics solutions. On the other hand, merchants will be less reliant on Chinese imports and expand their sourcing channels to more Southeast Asian countries as they migrate their supply chains. As a result, they will look to extend their upstream capabilities to access a wider

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value mix, which will open up more channels for logistics providers.

ASEAN Warehousing And Distribution Logistics Industry Overview

The warehousing and distribution market in the ASEAN region is fragmented, with many players trying to grab a significant chunk of the developing market. Some of the countries in the ASEAN region, like Indonesia and the Philippines, are moderately growing, with many local players and some international players. However, Singapore, Vietnam, and Thailand are highly competitive markets, with the presence of a large number of international players. CEVA, Yusen Logistics, Kerry Logistics, and DHL are among the major players present in the region. Increasing pressure from e-commerce and international trade has allowed the players to develop many warehouses in the region. Due to the long-term domestic presence, local players and distributors have been able to compete with international players.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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